



Facilities Work Request System

User Guide

(for processes inside and outside of Maximo)

Overview

The **Facilities Management & Logistics (FM&L)** group uses **Work Requests** as the primary means to generate work orders for Corrective Maintenance (CM), improvements (MOD) and Capital Project (CP) work performed at Jefferson Lab facilities. Preventive Maintenance (PM) work is set up to automatically generate work orders at scheduled intervals. **Maximo** (an asset management life cycle and workflow process management system), along with **front-end web applications**, is used to create, manage, resolve, and report on these work requests. The goal of this document is to provide an overview of the processes available inside and outside of Maximo to accomplish this. The FM&L website <https://www.jlab.org/facilities/facilitieshome> has useful resources and fillable forms along with a "WORK REQUEST SYSTEM" button at the top that you can click on to access the Work Request selection website (see next page).



FACILITIES MANAGEMENT

Engineering

Property

Security

Sustainability

WORK REQUEST SYSTEM

FM WEATHER PAGE

FACILITIES MANAGEMENT & LOGISTICS

Facilities Management & Logistics is responsible for performing or specifying performance of all Jefferson Lab facility maintenance, construction, security, property, and facility services.

The lab's 206-acre campus includes 169 acres owned by the U.S. Department of Energy and 37 acres owned by the Southeast Universities Research Association. In addition, the Commonwealth of Virginia owns a 5-acre parcel referred to as the Virginia Associated Research Campus (VARC) that the DOE leases for use in support of the lab.

The lab has 69 DOE-owned buildings (882,990 square feet), two state-leased buildings (37,643 square feet), and two off-site warehouse leases (17,549 square feet).

Additionally, the lab leases office and lab space (11,097 square feet) from the City of Newport News located in the Applied Research Center (ARC), which was constructed by the City of Newport News adjacent to the lab's campus.

Resources

- Subcontractor Forms
- Emergency Management
- Environment, Health & Safety
- Handy FM Links
- Key People to Contact
- Material Handling Equipment
- Site Plans
 - Aerial Photo
 - Master Plan
- US Postal Suites & Internal Mailstops
- Utility Outages
- Vehicle Motor & Equipment Procedures
- Vehicle Reservation Procedure
- Vehicle Inventory
- Weather Station
- Walking Trail Map
- Refuse and Recycling
 - Recycling (posted February 2017)
 - Paper Materials (print out)
 - Glass, Metal, Plastics (print out)
- Delivery and Receiving Route

Fillable Forms

- Leave Request Form
- Off Nominal Event Report
- Blind Penetration Permit
- Digging/Excavation Permit
- Foreign National Information Sheet
- Generic Security Plan
- Hot Work Permit
- Key Request
- Lost Key Report
- Relocatable Structures Permit
- Subcontractor Registration
- After-Hours Guard Instructions
- Electrical Job Briefing and Planning **Guidelines**
- Electrical Job Briefing and Planning **Checklist**

Facilities Policies and Work Rules

- After-Hours Work Events
- ARC Tenants Orientation
- Electrical Safety
- What FM Personnel Should Know

Work Request/Maximo User Guides

- JLab Facilities Work Request System User Guide
- JLab Maximo Work Request System Overview

Create a Work Request Outside of Maximo

[Privacy and Security Notice](#)

Jefferson Lab **Facilities Management** Work Request System - Customer Connection

Welcome, sippel
 [Home](#)
 [My Work](#)
 [Subcontractor Work](#)
 [SRF Work](#)
 [Logout](#)

If this is an emergency, please call Security at x5822 or Facilities Management at x7400

For all non-emergency requests, please select one of the following choices, submit the appropriate information, and your request will be routed to the correct work group by Facilities Management.

Submit Work Request

Property Request Key Request



Your Open Created Work Orders

| Wo Num | Date Reported | Status | Group | Description of Work |
|--------|----------------------|------------|-------|---|
| 414670 | 4/8/19 3:13:33 PM | APPR | FMM | External AC at bldg 89 has blades exposed |
| 414136 | 4/3/19 3:20:53 PM | APPR | FMM | Water leak coming from ceiling going into the vault |
| 408445 | 3/28/19 9:11:27 AM | WSCHWO | FMO-S | Bay door won't close |
| 399164 | 2/12/19 9:11:02 AM | FLDWRKCOMP | FMM | Data Center Room F112B A/C not cooling - same issue again |
| 389845 | 12/18/18 11:22:44 AM | WMATL | FMM | Low LCW Supply Pressure alarm |
| 366520 | 7/5/18 2:52:13 PM | APPR | FMO-S | Can hear water pouring inside the wall |

Your Open Requests



| Ticket ID | Date Reported | Status | Description of Work |
|-----------------------|----------------------|---------|---|
| 70510 | 4/8/19 3:13:33 PM | WORKING | External AC at bldg 89 has blades exposed |
| 70458 | 4/3/19 3:20:53 PM | WORKING | Water leak coming from ceiling going into the vault |
| 70368 | 3/28/19 9:11:27 AM | WORKING | Bay door won't close |
| 70145 | 3/15/19 1:10:43 PM | WORKING | Key Request Form: 83663 |
| 69646 | 2/12/19 9:11:02 AM | WORKING | Data Center Room F112B A/C not cooling - same issue again |
| 69300 | 1/17/19 2:29:48 PM | WORKING | Portable heater needed for GTS control room |
| 68993 | 12/18/18 11:22:44 AM | WORKING | Low LCW Supply Pressure alarm |
| 66728 | 7/5/18 2:52:13 PM | WORKING | Can hear water pouring inside the wall |

This website can also be accessed here: <https://misportal.jlab.org/work/index.jsf>. Select "Submit Work Request" for facilities maintenance related issues, "Property Request" to relocate/transfer/excess a property item, or "Key Request" for a new key. Your open requests and work orders are displayed at the bottom of the page.

Facilities Management & Logistics Website

FACILITIES MANAGEMENT

Engineering

Property

Security

Sustainability

WORK REQUEST SYSTEM

FM WEATHER PAGE

FACILITIES MANAGEMENT & LOGISTICS

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- Vehicle Reservation Procedure
- Vehicle Inventory
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Fillable Forms

- Leave Request Form
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- After-Hours Work Events
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- Electrical Safety
- What FM Personnel Should Know

Work Request/Maximo User Guides

- JLab Facilities Work Request System User Guide
- JLab Maximo Work Request System Overview

Go back to the FM&L website - <https://www.jlab.org/facilities/facilitieshome>, then click on "Handy FM Links" (shown on next page). It provides more useful links separated into groups for specialized needs.

Access to Maximo from the Facilities Handy Links Website

WORK REQUEST SYSTEM
FM WEATHER PAGE

FACILITIES HANDY LINKS

The Lab

| | | |
|--------------------------------------|--|---------------------------------------|
| Staff Search | JLab Phonebook | All Staff Memos |
| SAD Calendar | Accelerator Schedule | Cafeteria Menu |
| Computer Center CCPR | Computer Center Services | Telecommunications |
| Insight / Timesheet | MIS Apps / Reqs | Business Services |
| Stockroom | ES&H Manual | ES&H Manual Forms |
| Training/JList | Admin Manual | Procurement |
| Atis | Outage Management System | Safety Observations |
| JLab Drawings | Event Investigation Process | Snow Removal Plan |
| Rad Worker Training | SharePoint Home *NEW* | |

Facilities Management

| | | |
|---|-----------------------------------|--|
| My Work Orders in Maximo (Limited access) | outside of Maximo | Facilities Information Center |
| Work Orders - Subcontractor Connection | | Custom Work Order Search |
| Basic Site Plan (layers not supported in some browsers; use Adobe Reader or BlueBeam) | | Upcoming PMs for Group (select group, start/end dates to view upcoming PM release and due dates) |

TRs

| | |
|---|--|
| Your Pending Registrations to Sign (click on Entry ID #, scroll down, hit "Sign", hit back arrow to repeat) | |
| Helpful TR Links (subcontractor registration, training, and TR procedures) | TR Report (choose TR name to list active subcontractors by contract) |
| Expired Training (choose contract(s)) | Project Report (choose project(s)) |
| Subcontractor Report (choose subcontractor(s) and active/inactive JList status) | Subcontractor Badge Status Report (choose contract(s)) |
| Course Report by Subcontractor (choose subcontractor(s), contract(s), and/or skill(s)) | Subcontractor Training Taken or Required (choose subcontractor(s) and/or contract(s)) |
| Individual Training Status Report (choose name(s)) | Foreign National Contractors Report (click on a link) |
| Design, Construction and Project Management Procedures | |

From this website, you can click on the **"My Work Orders In Maximo"** link. Unless you have already logged into Maximo, you will be prompted to enter your Maximo user name and password before Maximo will display the **Start Center** page.

Maximo Start Center



Your Work Group tab

Welcome, Linda

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

FM - Admin FACILITIES MANAGEMENT

Change Content/Layout Display Settings Create New Template Modify Existing Template Update Start Center

Favorite Applications

- Service Requests
- Work Order Tracking

Pending Service Requests

| Affected User | Owner Group | Reported Date | Service Request | Status | Summary | Target Finish |
|---------------|-------------|------------------|-----------------|---------|--|------------------|
| Tina Menefee | FMENG | 4/4/19 2:31 PM | 70471 | PENDING | 3 swing gates needed for fixed ESR 1 ladders | 4/18/19 12:00 AM |
| Tina Menefee | FM | 3/18/19 3:43 PM | 70170 | PENDING | Relocate eyewash | 3/22/19 12:00 AM |
| Tina Menefee | FMENG | 3/22/19 12:13 PM | 70257 | PENDING | No room identification on the FM maps or the actual door for the ARC Elevator room | 4/19/19 12:00 AM |

[Set Chart Options](#) 1 - 3 of 3

KPI List

Last Run: 4/9/19 3:07 PM [Update](#)

| Status | KPI | Actual | Target | Variance |
|--------|---------------------|--------|--------|----------|
| ↓ | Pending FM Requests | 20 | 100 | -80 |
| ↓ | Open FM Requests | 662 | 200 | 462 |

My Service Requests - accepted by me

| Owner Group | Service Request | Status | Summary | Supervisor | Target Finish |
|-------------|-----------------|---------|----------------------------|------------|-------------------|
| FMM | 64197 | WORKING | Supplemental Heater Needed | 360801 | 12/31/18 12:00 AM |

[Set Chart Options](#) 1 - 1 of 1

My Workorders - Either lead or owner

| Description | Lead | Service Request | Status | Target Finish | Vendor | Work Group | Work Order |
|--|---------------|-----------------|--------|------------------|--------|------------|------------|
| Training Hours for Facilities Management Staff FY'19 | Bob Sperlazza | | APPR | 9/30/19 12:00 AM | | FMO | 379091 |
| Non-Project specific Project Meetings and Events FY'19 | Bob Sperlazza | | APPR | 9/30/19 12:00 AM | | FMO | 379092 |

[Set Chart Options](#) 1 - 2 of 2

The Maximo Start Center will automatically load the Work Requests – known as **Service Requests** in Maximo - for your **work group**.

View the **“Pending Service Requests”** section at the top of the page and click on a row to access the service request details as shown on the next page.

You can exit out of Maximo at any time by clicking on the **“Sign Out”** link in the top right corner of the dark blue bar, which is always visible in every Maximo application.

Accept Service Request and Create Work Order



Service Requests | Bulletin: (0) | Go To | Reports | Start Center | Profile | Sign Out | Help

Query | Find Service Request | Select Action

List View | Service Request | Log | Specifications | Reasons Tab | Service Address | Map

PRINTING: Please disable any pop-up blockers. You WILL NOT be able to print reports if pop-ups are being blocked.

To print, use paper icon for the type of printout you want in light blue toolbar. Once new window/tab opens with print version of report, press the print icon in the light blue toolbar again. You will see a box asking for the print format. Select pdf or report will not output correctly. Once pdf version opens, either follow dialog or press the print icon in the pdf toolbar.

Service Request: 70505 | Owner/Supervisor: | Owner Group: FMM | Status: **PENDING** | Attachments

Address Information

Service Address: | Formatted Address: | Street Address: | City: | State/Province: |

User Information

Reported By: 28425 | Name: Carroll Jones | Phone: 7672 | E-mail: jonesc@lab.org

Affected Person: 28425 | Name: Carroll Jones | Phone: 7672 | E-mail: jonesc@lab.org

Service Request Details

Summary: Replace Hall C Honeywell XL 100CU Controller

Configuration Item: | Target Description: |

Details: REPLACE HALL C HONEYWELL XL 100CU CONTROLLER - SEE QUOTE FOR CONTROLLER # 954-0329019dr (\$2882.05)

- EH&S Considerations -
- Minimum Access Training Requirements: Rad Worker 1, ODH 1
- Other Requirements or Special Conditions: Lock & Tag System(s) [Controls electrical power is 24 volts]
- Other EH&S requirements: Work must be completed during upcoming Accelerator Maintenance Period to access controller
- Project: FMOMG
- Org: FMM

Classification: FM \ FMI \ MECH \ HVAC \ HVACR

Description: Mechanical : HVAC : Repair/Maintenance

Reported Priority: 1 | Low

Internal Priority: 1

Create WO Options: CHILD

Asset: | Location: 96 | Experimental Hall C

Related Work Orders: Filter | 0 - 0 of 0

| Wo Num | Status | Total Cost |
|-------------------------------|--------|------------|
| There are no rows to display. | | |

Before the service request is accepted, its status is set to **"Pending"**.

Click on the **"Route Workflow"** process at the top in the light blue bar to accept the service request and create a work order. The service request status will change from **"Pending"** to **"Working"**, its information will be copied to the work order upon creation, and you will become the owner of both. The next page shows how to access the created **work order** from the service request.

Access a Work Order from a Service Request

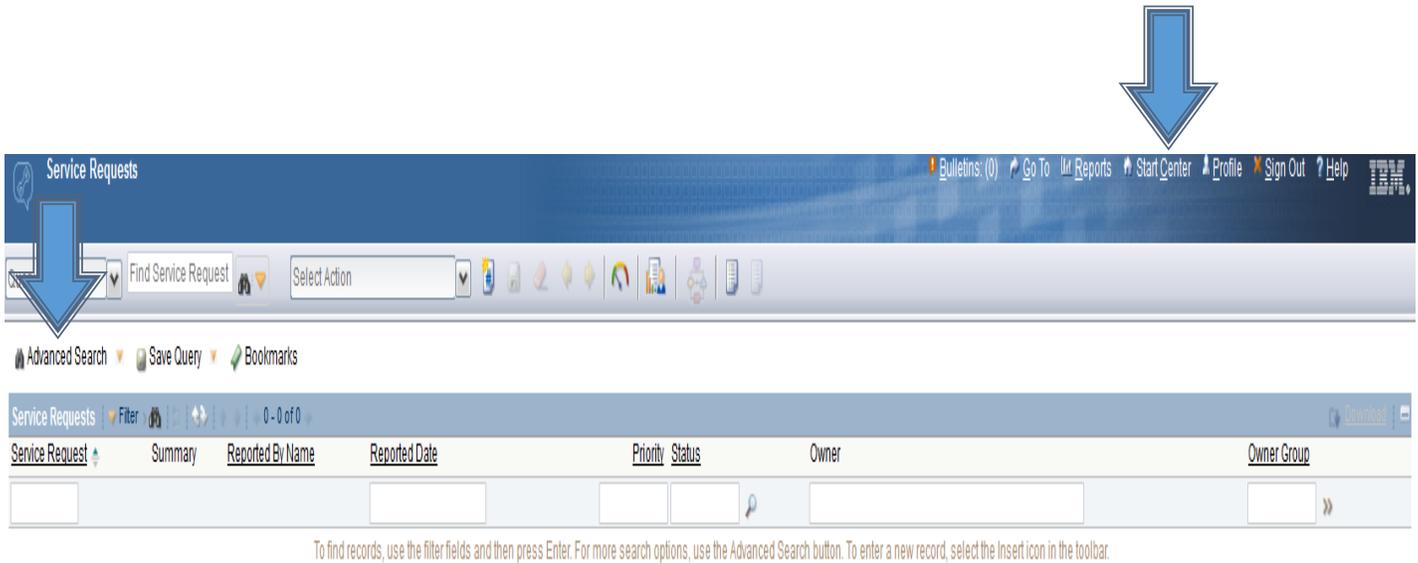
The screenshot displays the 'Service Requests' web application interface. At the top, there is a navigation bar with 'Service Requests' and various utility links. Below this is a toolbar with 'New Work Request' and 'Find Service Request' options. The main content area is divided into several sections:

- Service Request Summary:** Shows 'Service Request' number 68524, 'Owner/Supervisor', 'Owner Group' as 'FME', and 'Status' as 'WORKING'. A blue arrow points to the 'WORKING' status.
- Address Information:** Includes fields for 'Service Address', 'Formatted Address', 'Street Address', 'City', and 'State/Province'.
- User Information:** Lists 'Reported By' and 'Affected Person' as 'Paul Powers' with contact details like 'Phone: 7258' and 'E-mail: powersp@jab.org'.
- Service Request Details:** Contains a 'Summary' (Work by the Facilities LV Tech), 'Configuration Item', and 'Target Description'. The 'Details' section includes notes about work hours and training requirements.
- Classification and Options:** Shows 'Classification' as 'FM\FMI\ELECTRIC\ACCESS\ACCESSR', 'Description' as 'Access Control: Repair/Maintenance', 'Reported Priority' as '1 Low', and 'Location' as 'COMM Communications Distribution'.
- Related Work Orders:** A table at the bottom right shows a related work order with 'Wo Num' 398636, 'Status' 'WMATL', and 'Total Cost' 1,081.40. A blue arrow points to the 'Go To' button next to the work order number, which has a dropdown menu with options: 'Work Order Tracking', 'Work Order Tracking - SRF', and 'Work Order Tracking orig'.

At the bottom of the page, there is a footer with a JavaScript snippet and navigation links for 'Sequence', 'Mark Progress?', and 'Site'.

Now that the service request has been accepted and its status set to "Working", you can click on the **double right arrows** beside the **Work Order #** in the lower right to access the work order.

Search for a Service Request



The screenshot shows the 'Service Requests' search interface. At the top, there is a dark blue navigation bar with links for 'Bullets: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a light blue search panel containing a 'Find Service Request' input field, a 'Select Action' dropdown, and several icons. Further down is a table with columns: 'Service Request', 'Summary', 'Reported By Name', 'Reported Date', 'Priority', 'Status', 'Owner', and 'Owner Group'. A 'Download' link is located on the right side of the table. At the bottom, a note states: 'To find records, use the filter fields and then press Enter. For more search options, use the Advanced Search button. To enter a new record, select the Insert icon in the toolbar.'

Click on "**Start Center**" at the top right in the dark blue bar. Then click on the "**Service Requests**" link on the left side panel. The Service Request search screen will be displayed as shown above. Type in key word(s) in any of the blank fields and press "**Enter**" or click on "**Advanced Search**" and type in key word(s) in the blank fields, click on the **double right arrows** to select values, and/or select key word(s) using the **magnifying glass symbols**. Then click on the "**Find**" button.

The resulting search list will display how many items were found and let you see 20 items per page by clicking on the **left and right arrows** in the medium blue bar. You can also download the list to an excel file for easier searching by clicking on the "**Download**" link on the right side of the medium bar.

Sort the list by clicking on any of the **underlined field headings**. Hover over a service request number to see an underline appear under it. Click on it to access the service request contents.

Add Information to a Work Order Outside of Maximo



FACILITIES MANAGEMENT

- Engineering
- Property
- Security
- Sustainability
- Feedback
- Questions, Suggestions & Feedback (internal only)

WORK REQUEST SYSTEM

FM WEATHER PAGE

FACILITIES HANDY LINKS

The Lab

| | | |
|--------------------------------------|--|---------------------------------------|
| Staff Search | JLab Phonebook | All Staff Memos |
| SAD Calendar | Accelerator Schedule | Cafeteria Menu |
| Computer Center CCPR | Computer Center Services | Telecommunications |
| Insight / Timesheet | MIS Apps / Reqs | Business Services |
| Stockroom | ES&H Manual | ES&H Manual Forms |
| Training/JList | Admin Manual | Procurement |
| Atlis | Outage Management System | Safety Observations |
| JLab Drawings | Event Investigation Process | Snow Removal Plan |
| Rad Worker Training | SharePoint Home *NEW* | |

Facilities Management

| | | |
|---|---|--|
| My Work Orders in Maximo My Work Orders outside of Maximo (Limited access) |  | Information Center |
| Work Orders - Subcontractor Connection | | Custom Work Order Search |
| Basic Site Plan (layers not supported in some browsers; use Adobe Reader or BlueBeam) | | Upcoming PMs for Group (select group, start/end dates to view upcoming PM release and due dates) |

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|---|---|
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| Helpful TR Links (subcontractor registration, training, and TR procedures) | TR Report (choose TR name to list active subcontractors by contract) |
| Expired Training (choose contract(s)) | Project Report (choose project(s)) |
| Subcontractor Report (choose subcontractor(s) and active/inactive JList status) | Subcontractor Badge Status Report (choose contract(s)) |
| Course Report by Subcontractor (choose subcontractor(s), contract(s), and/or skill(s)) | Subcontractor Training Taken or Required (choose subcontractor(s) and/or contract(s)) |
| Individual Training Status Report (choose name(s)) | Foreign National Contractors Report (click on a link) |
| Design, Construction and Project Management Procedures | |

Go back to <https://www.jlab.org/facilities/handylinks>, then click on the **"WORK REQUEST SYSTEM"** button at the top of the page or click on the **"My Work Orders outside of Maximo"** link. This will allow you to easily see your open work orders without logging into Maximo to search for them. See the following pages for details.

Access Your Work Requests Outside of Maximo

[Privacy and Security Notice](#)



Welcome, sippel

[Home](#)

My Work

[Subcontractor Work](#)

[SRF Work](#)

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Property Request

Key Request

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| 399164 | 2/12/19 9:11:02 AM | FLDWRKCOMP | FMM | Data Center Room F112B A/C not cooling - same issue again |
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| Ticket ID | Date Reported | Status | Description of Work |
|-----------------------|----------------------|---------|---|
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| 70451 | 4/3/19 12:14:25 PM | WORKING | Water pouring through light fixture onto electrical equipment |
| 70368 | 3/28/19 9:11:27 AM | WORKING | Bay door won't close |
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| 66728 | 7/5/18 2:52:13 PM | WORKING | Can hear water pouring inside the wall |

Click on the **"My Work"** link at the top of the page to list your open work orders (see next page).

List Your Open Work Orders Outside of Maximo

The "My Work" screen lets you fill in/select items in the search boxes. Hold down the "Ctrl" key and press the left mouse button to choose multiple items in a selection box. Hit the "Search" button to display the results. Hit the "Reset" button to clear out the search items. Once you perform a search, you can save your search results by clicking on the "Save Search Results" link below these buttons and reload them at any time later using the "Load Saved Search" link in the left grey panel.

MENU:

- Search Workorders
- Load Saved Search**
- Work Request Home
- Provide Feedback

FACILITIES WORK ORDER TRACKING

Use the following fields to search for workorders

Wo #

Parent Wo #

Lead

Owner

Requester

Group

Status

Work Type

Location

Subcontractor

Target Finish Date

Description

[Save Search Results \(will reload search\)](#)

[Download Search Results To Excel](#)

Click on the "Download Search Results to Excel" link to create an excel spreadsheet of the search results.

Select a Work Order Outside of Maximo

Here is an example search with the results displayed at the bottom of the screen:

MENU:

- Search Workorders
- Load Saved Search
- Work Request Home
- Provide Feedback

FACILITIES WORK ORDER TRACKING

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Wo #

Parent Wo #

Lead

Owner

Requester

Group

Status

Work Type

Location

Subcontractor

Target Finish Date

Description

[Save Search Results \(will reload search\)](#)

[Download Search Results To Excel](#)

Show entries

Filter By:

| | WO# | SR# | Parent | Description | Group | Status | Work Type | Lead | Owner | Location | Asset |
|----------------------------------|----------------------|--------|--------|---|-------|--------|-----------|-----------------|---------------|------------------------------------|-------|
| <input type="button" value="+"/> | Edit | 399863 | 69882 | Repair Meter | FME | WSCH | CM | Phillip Stanley | John Riesbeck | Experimental Hall C (96) | |
| <input type="button" value="+"/> | Edit | 416025 | 70775 | Replace electrical power meters | FME | APPR | MOD | Phillip Stanley | John Riesbeck | Electrical Distribution (ELEC) | |
| <input type="button" value="+"/> | Edit | 420952 | 70809 | North Recombiner area needs additional emergency lights | FME | WSCH | PMF | Phillip Stanley | John Riesbeck | Accelerator Tunnel Floor 1 (999_1) | |

Each of the columns can be sorted. The "Filter By:" box can be used to further narrow down search results, but these results are not able to be included in the "**Download Search Results to Excel**" link.

Click on the "+" at the left of each work order to see the work order details. Click on the "**Edit**" link beside each to open in another window tab. It will display a screen to fill in/select items in the search boxes. Fields without boxes are not changeable. If you need one of these fields changed (ie: Target Finish Date), contact you supervisor/work coordinator to have them update it in Maximo. See next page for edit screen info.

View/Update Work Order Outside of Maximo

FACILITIES WORK ORDER TRACKING

[Go Back/Close](#)

Print

WO#: 399863
SR#: 69882
Date Reported: 2/26/2019
Target Finish Date: 9/30/2020
Requester: Jason Willoughby - 5372
Asset:
Parent Wo:
Vendor: AACT12
Priority: 1 - Low
Refrigerant Type:
Lbs Refrig Added:
Lbs Refrig Recovered:
Description: reading voltages. Check fuses/CPT. Must be coordinated with Joe Beaufait during a down in Hall C.
 - EH&S Considerations -
 -Minimum Access Training Requirements: Gert
 -Other Requirements or Special Conditions: None
 - Project:
 - Org:

Description: Repair Meter
Status: WSCH
Work Type: CM
Owner: John Riesbeck
Lead: Phillip Stanley
Group: FME
Category: Electrical : Power : Repair/Maintenance
Location: 98
Multiple Locations: Location Percentage

| | | | |
|-------------------------|----------------------|-------------------|----------------------|
| Material Cost | <input type="text"/> | Labor Hrs | <input type="text"/> |
| Material Desc | <input type="text"/> | Labor Description | <input type="text"/> |
| Material Vendor | <input type="text"/> | Labor Date | 02/21/2020 |
| Communication Log Entry | | | |
| <input type="text"/> | | | |



Attachments:

 No file selected.

Labor

| Labor Cost | Laborer | Date | Craft | HRS | Labor Desc |
|------------|----------|-----------|-------|-----|--|
| \$30.59 | PSTANLEY | 1/22/2020 | SHOP | 1.0 | looked over work gathered fuse to replace one that was blown, waiting till shutdown/pm |
| \$30.59 | DUNLAP | 1/22/2020 | SHOP | 1.0 | looked over work gathered fuse to replace one that was blown, waiting till shutdown/pm |

Materials

| Material/Service Cost | Material Desc | Entered By |
|-----------------------|---------------|------------|
|-----------------------|---------------|------------|

Log Entries

| Create Date | Type | Commenter | Comment |
|-------------|------------|-----------|--------------|
| 1/22/2020 | CLIENTNOTE | PSTANLEY | work to date |

Multiple Locations

| Location | Percentage |
|----------|------------|
|----------|------------|

You can attach documents, add or update an asset, vendor, refrigerant information, location, work type and work category, add multiple locations and change the work order status per your group's workflow procedures.

You can add material costs, labor hours, and log entries. Once saved, they will display lower on the page along with previous entries. If there are child work orders, they will be displayed at the bottom of the page.

Hit the "Save" button to save your changes. Click on the "Go Back/Close" link at the top left corner to exit and remove this window tab. Click on "Print" to display a print screen where you can left click on the upper right horizontal  to select the print menu option.

Add Information to a Work Order in Maximo

FACILITIES MANAGEMENT

- Engineering
- Operations & Maintenance
- Property
- Security
- Sustainability

WORK REQUEST SYSTEM

FM WEATHER PAGE

FACILITIES HANDY LINKS

The Lab

| | | |
|----------------------|-----------------------------|---------------------|
| Staff Search | JLab Phonebook | All Staff Memos |
| SAD Calendar | Accelerator Schedule | Cafeteria Menu |
| Computer Center CCPR | Computer Center Services | Telecommunications |
| Insight / Timesheet | MIS Apps / Reqs | Business Services |
| Stockroom | ES&H Manual | EH&S Manual Forms |
| Training/JList | Admin Manual | Procurement |
| Atlas | Outage Management System | Safety Observations |
| JLab Drawings | Event Investigation Process | Snow Removal Plan |

Facilities Management

| | | |
|---|---|---|
| My Work Orders (FM Staff Connection) |  | Facilities Information Center |
| Work Orders - Subcontractor Connection | | Facilities PMs, Projects' Milestones |
| Basic Site Plan (layers not supported in some browsers; use Adobe Reader or BlueBeam) | | Upcoming PMs for Group (select group, start/end dates to view upcoming PM release and due dates) |

SOTRs

| | |
|---|--|
| Links for SOTRs (subcontractor registration, training, and SOTR procedures) | SOTR Report (choose SOTR to list active subcontractors by contract) |
| Expired Training (choose contract(s)) | Project Report (choose project(s)) |
| Subcontractor Report (choose subcontractor(s) and active/inactive JList status) | Subcontractor Badge Status Report (choose contract(s)) |
| Course Report by Subcontractor (choose subcontractor(s), contract(s), and/or skill(s)) | Subcontractor Training Taken or Required (choose subcontractor(s) and/or contract(s)) |
| Individual Training Status Report (choose name(s)) | Foreign National Contractors Report (click on a link) |

Go back to <https://www.jlab.org/facilities/handylinks>, then click on the “**My Work Orders**” link. If not already logged in, you will then be prompted to enter your **Maximo username and password**.

Access Work Orders in Maximo

FM - Admin FACILITIES MANAGEMENT

Change Content/Layout Display Settings Create New Template Modify Existing Template Update Start Center

Favorite Applications

Service Requests

Work Order Tracking

KPI List



Pending Service Requests

| Affected User | Owner Group | Reported Date | Service Request | Status | Summary | Target Finish |
|----------------------|----------------------|----------------------|----------------------|----------------------|--|----------------------|
| <input type="text"/> | <input type="text"/> |
| Tina Menefee | FMENG | 4/4/19 2:31 PM | 70471 | PENDING | 3 swing gates needed for fixed ESR 1 ladders | 4/18/19 12:00 AM |
| Tina Menefee | FM | 3/18/19 3:43 PM | 70170 | PENDING | Relocate eyewash | 3/22/19 12:00 AM |
| Tina Menefee | FMENG | 3/22/19 12:13 PM | 70257 | PENDING | No room identification on the FM maps or the actual door for the ARC Elevator room | 4/19/19 12:00 AM |

Set Chart Options 1 - 3 of 3

My Service Requests - accepted by me

| Owner Group | Service Request | Status | Summary | Supervisor | Target Finish |
|----------------------|----------------------|----------------------|----------------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| FMM | 64197 | WORKING | Supplemental Heater Needed | 360801 | 12/31/18 12:00 AM |

Set Chart Options 1 - 1 of 1

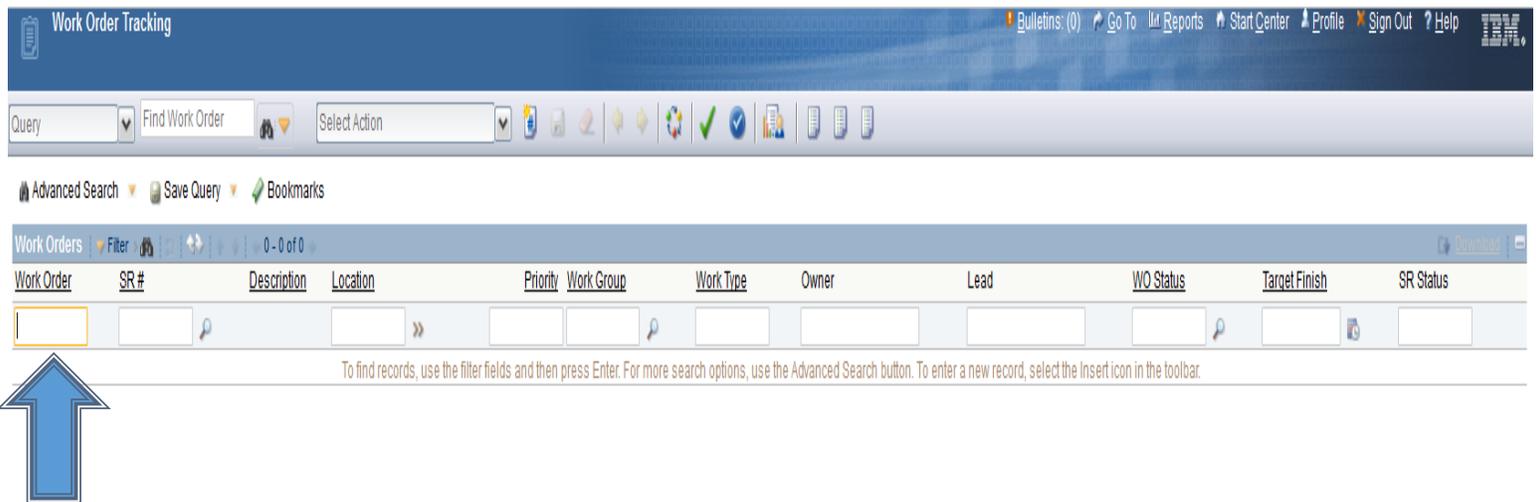
My Workorders - Either lead or owner

| Description | Lead | Service Request | Status | Target Finish | Vendor | Work Group | Work Order |
|--|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Training Hours for Facilities Management Staff FY'19 | Bob Sperlazza | | APPR | 9/30/19 12:00 AM | | FMO | 379091 |
| Non-Project specific Project Meetings and Events FY'19 | Bob Sperlazza | | APPR | 9/30/19 12:00 AM | | FMO | 379092 |

Set Chart Options 1 - 2 of 2

The **Maximo Start Center** will automatically load the **Service Requests** at the top along with the open work orders lower down for your work group. You can either select a work order from the work order list which will directly open the work order edit screen or select the **“Work Order Tracking”** link on the left. The Work Order search screen will then be displayed as shown on the next page.

Entering the Work Order # in Maximo



The screenshot shows the Maximo Work Order Tracking interface. At the top, there is a navigation bar with 'Work Order Tracking' and various utility links like 'Bullets: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a toolbar with a 'Query' dropdown, a 'Find Work Order' button, and a 'Select Action' dropdown. Further down, there are links for 'Advanced Search', 'Save Query', and 'Bookmarks'. The main area displays a table with columns: 'Work Order', 'SR #', 'Description', 'Location', 'Priority', 'Work Group', 'Work Type', 'Owner', 'Lead', 'WO Status', 'Target Finish', and 'SR Status'. The 'Work Order' column is highlighted with a blue arrow pointing upwards. Below the table, a note reads: 'To find records, use the filter fields and then press Enter. For more search options, use the Advanced Search button. To enter a new record, select the Insert icon in the toolbar.'

In the box marked “**Work Order**” – you can type in a specific work order number to edit. You can also type in any of the other blank fields or click on the “**Advanced Search**” link to specify other search criteria.

Press the “**Enter**” key to see the **work order search results listings** displayed as shown on the following page.

Selecting the Work Order # in Maximo

Work Order Tracking

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Query Find Work Order Select Action

Advanced Search Save Query Bookmarks

Work Orders Filter 1 - 1 of 1 Download

| Work Order | SR # | Description | Location | Priority | Work Group | Work Type | Owner | Lead | WO Status | Target Finish | SR Status |
|---------------|-------|-------------------------|----------|----------|------------|-----------|------------|------------|-----------|-----------------|-----------|
| 178487 | | | | | | | | | | | |
| 178487 | 53266 | Penetration Leak Repair | 999 | 1 | FMENG | CP | Ed Winslow | Ed Winslow | APPR | 5/3/20 10:40 AM | WORKING |



Click on the **work order number** to open the work order. A **“Work Order”** tab with work order details will be displayed along with other tabs at the top available for additional information to be entered as shown on the following pages.

Click on **“List View”** to exit the work order and display the work order search results listings again.

“Work Order” Tab in Maximo

Work Order Tracking

Query: Find Work Order | Select Action

Navigation: List View | **Work Order** | Plans | Actuals | Log | Reasons | Assignments | Service Address | Map

Message: Please either change the lead or vendor to assign this workorder to. Be sure to hit the save button in the menu bar after making edits.

PRINTING (indicated by a blue arrow)

Workorder Information

Work Order: 178487 | Penetration Leak Repair

Location: 999 | Accelerator Tunnel

Asset: [Empty]

Parent WO: [Empty]

Classification: FM \ FMI \ ARCHIT \ STRUC \ STRUCR

Class Description: Repair/Maintenance

Details:

- Parent work order to repair leaking penetrations at stations 26+91, 25+96 (both wave guide) and 7+56 that just needs to be reinstalled.
- Schedule Considerations -
- Explanation: Complex project. Design over the winter with execution in summer '16 SAD
- EH&S Considerations -
- Minimum Access Training Requirements: Rad Worker 1, ODH 1, ODH 2
- Other Requirements or Special Conditions: Work >6 Ft above ground

Reported By: Ed Winslow

Reported By Location: 28_173

Reported Date: 11/19/15 10:54 AM

On Behalf Of: Ed Winslow

Phone: 7316

On Behalf Of Location: 28_173

Safety Checklist

- Complete safety checklist
- Review completed safety checklist

Priority

Asset Location Priority: [Empty]

Priority: 1 | Low

Priority Justification: [Empty]

Risk Assessment: [Empty]

General Information

Attachments

WO Status: APPR

Status Date: 11/19/15 10:59 AM

Work Type: CP

Class: WORKORDEF

Originating Record: 53266

Orig Record Type: SR

SR Status: WORKING

Work Group: FMENG

Owner: 11753 | Ed Winslow

Lead: 11753 | Ed Winslow

Vendor: [Empty]

Need Reassign?:

Subcontractor Information

Task Order: [Empty]

Estimate Required: [Empty]

Payment Basis: [Empty]

Refrigerant Added Amt: [Empty]

Refrigerant Type: [Empty]

Refrigerant Recovered Amt: [Empty]

Estimated Cost: [Empty]

Contract: [Empty]

Craft: [Empty]

The “**Work Order**” tab provides most of the information needed to identify the work being done and who is working on it, including the title, description, location, status, work type, work group, owner, and lead. At the bottom is a summary of PO and PR line items and totals from the “**Actuals**” tab.

The other tabs we use are: **Plans, Actuals, and Log**. Click on “**Plans**” to add child work orders if this work order is a parent project (CP) work order. Click on “**Actuals**” to add the PO and PR line items, labor hours, and/or materials costs. Click on “**Log**” to add log entries describing the work performed, issues, delays, etc. See the following pages for further details on these tabs.

"Plans" Tab in Maximo

Work Order Tracking

Query Find Select Action

List View Work Order Plans Actuals Log Reasons Assignments Service Address Map

Work Order 374235 Building 89 Renovation Site JLABSTE1 Status COMP

Parent WO »

Children of Work Order 374235 Filter 1 - 3 of 3 Download

| Sequence | Record | Record Class | Summary | Lead | Display Name | Location | Asset | Status |
|----------|--------|--------------|------------------------------|--------|-------------------|----------|-------|--------|
| | 399625 | | 89 Renovation (A/E Design) | 19423 | Christine Snetter | 89 | | COMP |
| | 399626 | WORKORDER | 89 Renovation (CM A/E) | 313271 | Thomas Renzo | 89 | | COMP |
| | 399627 | WORKORDER | 89 Renovation (Construction) | 313271 | Thomas Renzo | 89 | | COMP |

Select Assets Select Locations Select Work Orders New Row

Tasks for Work Order 374235 Filter 0 - 0 of 0 Download

| Sequence | Task | Summary | Estimated Duration | Status | Owner | Owner Group |
|-------------------------------|------|---------|--------------------|--------|-------|-------------|
| There are no rows to display. | | | | | | |

Labor Materials Services Tools

Labor Filter 0 - 0 of 0 Download

| Task | Crew Type | Craft | Skill Level | Vendor | Quantity | Labor | Crew | Regular Hours | Rate | Line Cost |
|-------------------------------|-----------|-------|-------------|--------|----------|-------|------|---------------|------|-----------|
| There are no rows to display. | | | | | | | | | | |

Select Crew Type Select Craft New Row

The **"Plans"** tab allows you to create **child work orders** linked to the current work order (parent) by clicking on the **"New Row"** button at the bottom right side of this section (Children of Work Order ...). As you create the child work order(s), click on the **"Save"** symbol  at the top in the light blue bar.

Click on the **double right arrows to the right of each child work order #** to open them. Child work orders can have the following work types: CMGT (Construction Management), CONST (Construction), DSGN (Design), SOW (Scope of Work), and STDY (Study). Be sure to set the work group and child work order owner and lead as well. Press the **"Return"** button at the top right corner to return to the parent work order.

"Actuals" Tab in Maximo

Work Order tracking

Query: Find Work Order | Select Action

Work Order: 178487 | Penetration Leak Repair | Site: JLABSTE1 | Status: APPR

Purchase Orders (1 - 4 of 4)

| Item | Description | Line Cost | Required Date | Order Date | PO | Company | Status |
|----------|--------------------------------|-----------|---------------|------------|--------------|---------|--------|
| | PROVIDE LABOR, GROUT PUMP AND | 300.00 | | 4/19/16 | 14A0505322-0 | DGSPAI | APPR |
| | FABRICATE MOCK UP FOR | 6,768.00 | | 11/16/18 | 13A0753355-0 | SHOREL | APPR |
| | BASIC ORDERING AGREEMENT FOR | 1,289.99 | | 11/15/18 | 19-M0199-0 | DGSPAI | APPR |
| | PROVIDE LABOR AND EQUIPMENT TO | 975.00 | | 7/5/17 | 14A0505409-0 | DGSPAI | APPR |
| PO Total | | 9,332.99 | | | | | |

Purchase Requisitions (1 - 5 of 8)

| Item | Description | Line Cost | Required Date | PO | PR | Company | Status |
|----------|-------------|-----------|---------------|--------------|--------|---------|--------|
| - | | 300.00 | | 14A0505322-0 | 362862 | | D |
| - | | 975.00 | | 14A0505409-0 | 370985 | | D |
| - | | 320.00 | | CC-376036 | 376036 | | E |
| - | | 140.00 | | | 376036 | | E |
| 1 | | 4,500.00 | | 13A0753355-0 | 380826 | | D |
| PR Total | | 14,503.00 | | | | | |

Actual Labor Cost: 8,543.06 | Actual Material Cost: 2,030.35 | PO Cost: 9,332.99 | Total Cost: 19,906.40

Children of Work Order 178487 (0 - 0 of 0)

Tasks for Work Order 178487 (0 - 0 of 0)

There are no rows to display.

Labor (1 - 5 of 5)

| Labor | Name | Regular Hours | Memo | Approved? |
|---------|------------|---------------|------------------------------|-----------|
| MEIER | Todd Meier | 100.00 | | ✓ |
| WINSLOW | Ed Winslow | 2.00 | more discussion | ✓ |
| WINSLOW | Ed Winslow | 2.00 | meeting, tunnel visit | ✓ |
| WINSLOW | Ed Winslow | 50.00 | research and experimentation | ✓ |
| WINSLOW | Ed Winslow | 4.00 | 178487 | ✓ |

Enter Time By Crew | Select Labor | Select Planned Labor | New Row

The "Actuals" tab is populated with PO and PR line items from Costpoint once they are associated with the work order # in the JLab Requisition System - <https://misportal.jlab.org/reqs/goHome.do>.

At the bottom of the page are **Labor, Materials, Services, and Tools** tabs. We use the Labor and Materials tabs to record labor hours and materials costs. Click on the "New Row" button to create new line items on the applicable tab. For Labor, the Labor field requires your username, fill in Memo with a labor description, and put in the labor hours. For Materials, first select the "Material" type, then put in a vendor, purchase card type, description, quantity, and unit cost.

The **Actual Labor Cost** and **Actual Material Cost** values are recorded along with the **PO Cost** to provide the **Total Cost** of the work order. These fields are located just below the "Purchase Requisition" section and above the "Children of Work Order ..." section.

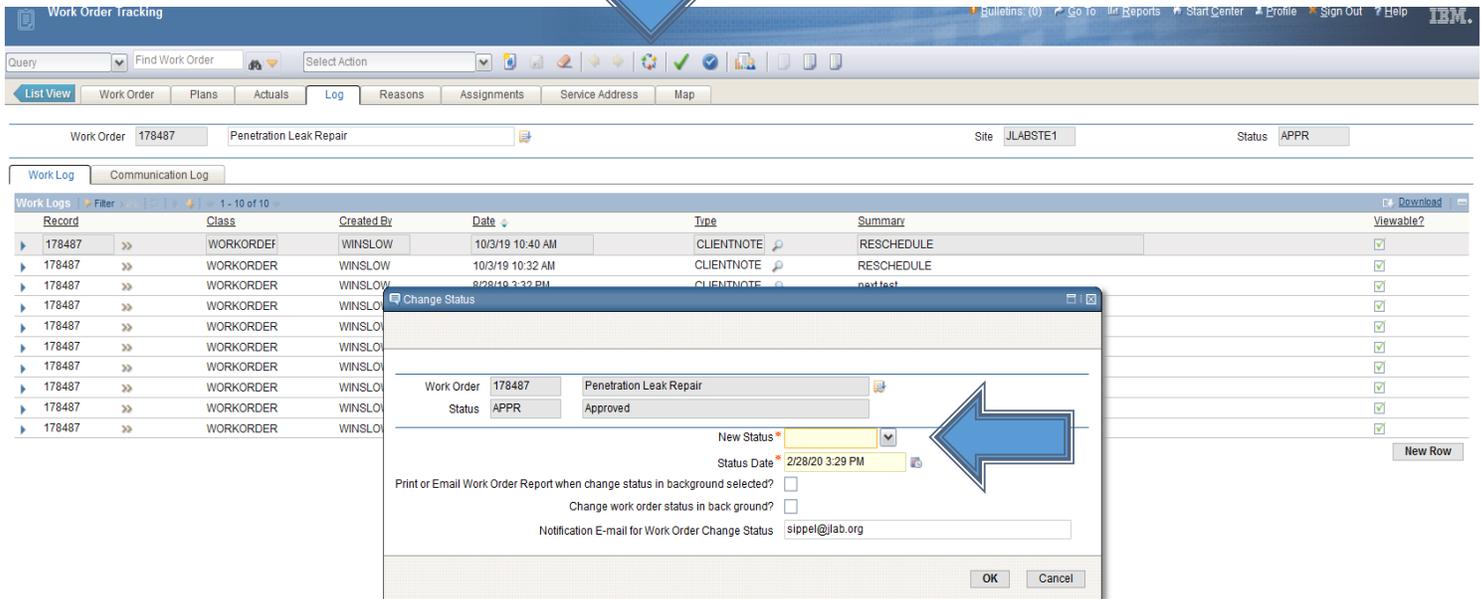
“Log” Tab in Maximo

The screenshot displays the Maximo Work Order Tracking interface. The top navigation bar includes 'List View', 'Work Order', 'Plans', 'Actuals', 'Log', 'Reasons', 'Assignments', 'Service Address', and 'Map'. The 'Log' tab is selected. Below the navigation bar, the work order details are shown: Work Order 178487, Description Penetration Leak Repair, Site JLABSTE1, and Status APPR. The 'Work Log' section is active, showing a table of logs. A blue arrow points to the 'Log' tab in the navigation bar. Another blue arrow points to the 'New Row' button at the bottom right of the table.

| Record | Class | Created By | Date | Type | Summary | Viewable? |
|--------|-----------|------------|------------------|------------|------------|-------------------------------------|
| 178487 | WORKORDER | WINSLOW | 10/3/19 10:40 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 10/3/19 10:32 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 8/28/19 3:32 PM | CLIENTNOTE | next test | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 1/17/19 9:41 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 9/7/18 2:13 PM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 7/9/18 2:59 PM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 2/23/18 4:16 PM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 9/6/17 11:11 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 6/16/17 10:14 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 10/19/16 1:42 PM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |

The “Log” tab allows you to record communications with the service requester and provide status updates about the work progress, rescheduling, completion, deferral, or cancellation.

Completing a Work Order in Maximo



| Record | Class | Created By | Date | Type | Summary | Viewable? |
|--------|-----------|------------|------------------|------------|------------|-------------------------------------|
| 178487 | WORKORDEF | WINSLOW | 10/3/19 10:40 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 10/3/19 10:32 AM | CLIENTNOTE | RESCHEDULE | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | 8/28/19 3:32 PM | CLIENTNOTE | next test | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |
| 178487 | WORKORDER | WINSLOW | | | | <input checked="" type="checkbox"/> |

Once the work is complete, click on the **Status Change** icon at the top on the light blue bar to set the work order to **“Complete”** for PMs or **“Field Work Complete”** for all other work types. Add a description of the status change in the Memo field. Then click on **“OK”** to change the work order status. You can also click on the  to complete it.

Actuals may still be added until the work order has been set to **“Complete”**. If changes are needed after that, the work order will need to be reopened.

For completions, you will be asked if you want to close the service request as well. Select **“OK”** only if all of the work for this task has been complete.